



We Build Futures

Neshaminy School District

Administrative Offices • 2001 Old Lincoln Highway • Langhorne, PA 19047

January 2022

Dear Neshaminy Resident:

On August 24, 2021, the Board of School Directors made a motion to rename the program after Irene Boyle, who in her capacity as a school board member for 16 years, continuously advocated for the tax rebate program.

Enclosed are your application form and instructions for The Irene Boyle Senior Citizen Tax Assistance Program. The purpose of the program is to provide property tax relief to our senior citizens. **It is important that you take the time to read this entire letter and follow the guidelines listed on the attached pages.**

This program is entering its forty-fourth year. Since 1977 rebates totaling approximately \$2.9 million have been paid by the school district, with over 220 senior citizens participating last year. We hope that the amount for which you qualify helps to partially overcome today's high cost of living for those on fixed incomes. Rebates are based on household income. In order to qualify,

1. **Your TOTAL household income must be less than \$30,000 and**
2. **You or your spouse must have reached the age of 65 by December 31, 2021, and**
3. **Your rebate property must be your primary residence.**

The program increased household income eligibility not to exceed \$29,999. Again, this year the rebate program requires that only 50% of Social Security, SSI Payments and Railroad Retirement Benefits Tier (1) be reported as income. A signed copy of your PA Property Tax Rebate Application, Form PA-1000, **MUST** be included with your Neshaminy School District Property Tax Assistance form. See the Instructions and Enclosures Needed page of this packet for all required documentation.

If you are a widow or widower who is 50 years of age or older and qualified previously because your spouse was 65 years old or older, you will not be excluded from the program because of your age. Check **"Who Should File?"** on the attached pages to determine if you qualify.

The school district will make every effort to send your rebate within eight-twelve weeks of receipt of your application. However, our success in this area will depend on your cooperation by providing all the necessary information and substantiating documents, and by filing your claim as early as possible. Last year the district mailed over 400 applications to current and new senior applicants. **Nearly 120 applications had to be returned to the taxpayer because of insufficient data.** In addition to delaying all rebates, incomplete applications have the potential of not meeting the deadline of June 15.

Please call us if you have not received a rebate or correspondence from us after twelve weeks of sending us your application. If you have any questions about our rebate program, or if you require assistance in completing the form, you may call either your local tax collector or the Neshaminy School District Business Office at 215-809-6520.

Sincerely yours,

Donald B. Irwin, Jr.

Business Administrator

NOTE REGARDING PENNSYLVANIA REBATE PROGRAM: We would like to alert you to the probability that if you qualify for Neshaminy's rebate program, you would also qualify for the Pennsylvania Property Tax Program. The state program provides funds in addition to the Neshaminy rebate program and funds can be received from **both**. If you have not filed with the Commonwealth of Pennsylvania previously, you should call 1-888-222-9190 to order a form. This information is intended only to inform you; Neshaminy does **not** process the Pennsylvania rebates.

**THE IRENE BOYLE
PROPERTY TAX ASSISTANCE PROGRAM**

**2021 REBATE PROGRAM
FILING CHECK LIST**

CHECK THE FOLLOWING BEFORE SUBMITTING YOUR REBATE

**PROOF OF ALL INCOME REPORTED MUST BE ENCLOSED WITH
THE REBATE FORM**

- ✓ **SIGN AND DATE THE REBATE FORM IN INK. FORM MUST BE COMPLETED IN INK OR TYPED – PENCIL IS NOT ACCEPTABLE**

Please see the **Instructions and Enclosures** page in this packet for all necessary photo copied documents that you must submit with the form, including but not limited to the following:

- ✓ **COPY OF SSA 1099 OR RRB 1099** (Social Security Benefits Statement or Railroad Retirement Benefits Statement)
- ✓ **COPY of all 1099-R** (Distribution Forms, Pensions, Annuities, Retirement or Profit-sharing plans, IRAs, insurance contracts, etc.)
- ✓ **COPY of 1099-INT and 1099-DIV**
- ✓ **SIGNED COPY OF YOUR PA-1000 FOR 2021** (PENNSYLVANIA PROPERTY TAX REBATE FORM)
- ✓ **COPY OF YOUR 2021 NESHAMINY SCHOOL DISTRICT TAX BILL – MUST BE MARKED PAID BY YOUR TAX COLLECTOR**
- ✓ **ATTACH PROOF OF AGE IF NOT PREVIOUSLY SUBMITTED** (Copy of Pennsylvania Photo Driver's License or Birth Certificate – Health Insurance Cards are not acceptable)

MAIL COMPLETED REBATE FORM AND ALL REQUIRED DOCUMENTATION TO

NESHAMINY SCHOOL DISTRICT

**TAX ASSISTANCE PROGRAM
2001 OLD LINCOLN HIGHWAY
LANGHORNE, PA 19047
FILING DEADLINE JUNE 15, 2022**

Office of the Business Administrator – The Irene Boyle Senior Citizen Tax Assistance Program

Who should file?

- The claim application applies only to those senior citizens sixty-five (65) years of age or over. At least one of the owners requesting the assistance must have attained the age of sixty-five (65) on or before December 31, 2021. If death should occur to the owner who had previously submitted a qualifying Neshaminy School District Assistance Form, the surviving owner (widow or widower) would qualify for the program provided he or she has attained the age of fifty (50) on or before December 31, 2021. Should the surviving spouse remarry, eligibility would again be determined by at least one of the owners attaining the age of sixty-five on or before the previous December 31.
- Only one claimant (person filing the claim sixty-five (65) years of age or over, or a qualifying widow/widower fifty (50) years of age or over) from a homestead each year is entitled to property tax assistance.
- Applications for assistance are applicable only to the owners of real estate on which the assistance is requested and applicant must reside at the property.
- A claim shall be disallowed if the claimant received title to the homestead primarily for the purpose of receiving property tax assistance.
- No refunds will be paid to an estate. Only the eligible senior taxpayer or surviving spouse will receive rebate.

Income Eligibility

Your total eligible annual **household income**, including the income that your spouse/and or any other household resident(s) earned and received while residing with you was \$29,999 or less in 2021. Household is considered anyone who resides in the home.

What must be included in household income?

You must report the **total household income** you earned and/or received during 2021 for each category, which includes your spouse's and or any other household resident(s) income earned and/or received while residing with you. Household/Household resident is anyone who resides in the home.

Signatures – Sign and date the claim form in the space provided. The signature must match the name listed on the label or printed on the name line. If someone other than the claimant signs the claim form, a copy of the Power of Attorney entitling that person to sign must accompany the claim form.

Mailing Instructions & Deadlines

You must complete and submit one original claim form **no later than June 15, 2022**. Send the completed form and all necessary attachments to:

**Neshaminy School District
Tax Assistance Program
2001 Old Lincoln Highway
Langhorne, PA 19047**

Complete this section if you owned and occupied your Neshaminy property for only a portion of 2021

A. Number of eligible months	
B. Percentage of year eligible (divide months by 12)	
C. Amount of Rebate from Schedule Above	\$
D. Pro-rated Rebate Amount (B times C)	\$

If an application has been returned to the taxpayer because of insufficient documentation, the required information must be received by the school district no later than July 31, 2022.

Restrictions

- In no event may the total tax assistance from both the school district and the Commonwealth of Pennsylvania exceed the total real estate taxes paid for any applicable year. In such cases, the tax assistance provided by the school district will be adjusted accordingly.
- When a school tax bill has been paid delinquent, the school district incurs a 5% collection fee. In claims submitted where this is the case, such collection fees incurred by the district will be deducted from any refund due the taxpayer.
- Any case in which a claim application is excessive and was filed with fraudulent intent, the claim shall be disallowed in full and a penalty of twenty-five percent (25%) of the amount claimed shall be imposed. The penalty and the amount of the disallowed claim, if the claim has been paid, shall bear interest at the rate of one-half percent per month from the date of the claim until repaid. The claimant and any person who assisted in the preparation of filing of a fraudulent claim shall be guilty of a misdemeanor, and, upon conviction thereof, shall be sentenced to pay a fine not exceeding one thousand dollars (\$1,000), or undergo imprisonment not exceeding one year, or both.

Over →



Neshaminy School District

The Irene Boyle Senior Citizen Tax Assistance Program

2001 Old Lincoln Highway
Langhorne, PA 19047

Complete, sign and return this application with proof of age (if not on file), income and paid taxes to address shown here no later than June 15, 2022

2021 Property Tax Rebate

Taxpayer Identification
Name:
Address:
Date of Birth:
Phone Number:
Spouse's Name:
Spouse's Date of Birth:

Parcel Number: _____

Amount Paid
**NESHAMINY SCHOOL DISTRICT
PROPERTY TAX ONLY**

Your Social Security # _____

Spouse's Social Security # _____

Have you included the following with this application?:

	Check off Below	Internal use only
Copy of SSA 1099		
Copy of all 1099-R forms		
Copy of all 1099-INT / 1099-DIV		
Copy of PA-1000, signed		
Copy of Paid School Tax Bill		
Proof of Age		
Census Verification		

Tax Assistance Schedule (based on household income)

If your Income Range is:	Maximum Rebate- Total of PA Property Tax Rebate and Neshaminy School District Rebate CANNOT Exceed School District Real Estate Tax Paid.
\$0 - \$9,000	\$650
\$9,001 - \$11,000	\$600
\$11,001 - \$13,000	\$550
\$13,001 - \$16,000	\$500
\$16,001 - \$17,000	\$400
\$17,001 - \$20,000	\$300
\$20,001 - \$24,999	\$250

I declare under penalty of law that the questions answered in the above are true and correct to the best of my knowledge. Fraudulent claims will be disallowed in full and a 25% penalty and interest will be charged.

X _____

CLAIMANT'S SIGNATURE

DATE

X _____

SPOUSE

DATE

Household Income	Total
(1) Social Security (50% of all benefits)	
(2) Railroad Retirement (50% of all Tier 1 benefits)	
(3) Pensions/ Annuity and IRA Distributions And Tier 2 Benefits	
(4) Interest/Dividend Income	
(5) Capital Gains	
(6) Rental Income	
(7) Net Business Income	
Other Income - Itemize the amounts received from each of the sources below.	
(8a) Wages and Salary	
(8b) Lottery and or Other Prize Winnings	
(8c) Value of inheritances, alimony and spousal support.	
(8d) Cash Public Assistance, unemployment compensation and worker's compensation benefits.	
(8e) Gross Amount of Disability and/or Death Benefits (in excess of \$5,000)	
(8f) Gifts in excess of \$300 except gifts between members of a household.	
(8g) Miscellaneous income not listed above.	
Total 2021 Annual Household Income	

X _____

Signature of Preparer, if other than Claimant